

Creating a Consent

Create the Consent

Utilize these instructions for consenting information.

1. **Getting here:** Login, select the **Facility**, select **Client List** on the Navigation Pane (left menu) to generate the Client Search Screen, find client, select **Activity List**.

NOTE: The Intake Activity Date will be used as the Earliest Date of Consented Activities on the Consent.

2. Select **Consent** on the Navigation Pane.

Idaho-WITS Training

User: Buskey, Michelle
Loc: D Williams Agency, Williams Treatment
Client: Morning, Thursday | 21010187389320H | Case #: 1

October 2013, Rev 3

Printable View

Log out

Home Page
Agency
Group List
Clinical Dashboard
Client List
Client Profile
Gain Short Screener
Eligibility Screener
Benefit Application
Linked Consents
Non-Episode Contact
Activity List
Episode List
System Administration
My Settings
Reports
Support Ticket

Client Search

Agency: D Williams Agency
First Name: thu*
SSN:
Idaho-WITS Training Client Id:
Unique Client Number:
Treatment Staff:
Case Status: All Clients
Other Number:
Include Only Active Consents: Yes

Facility:
Last Name:
DOB:
Provider Client ID:
Primary Care Staff:
Intake Staff:
Number Type:

Clear Go

Client List (Export) Add Client

Unique Client #	Full Name	DOB	SSN	Gender	Actions
21010187389320H	Morning, Thursday	10/10/1987	389-92-3893	Female	Profile Activity List Delete Record Linked Consents

Clients with Consents from Outside Agencies

Agency	Unique Client #	Client Name	DOB	SSN	Gender	Actions
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Client Activity List

Activity	Activity Date	Created Date	Status	Actions
Client Information (Profile)	11/7/2013	11/7/2013	Completed	Review
Intake Transaction	11/7/2013	11/7/2013	Completed	Review
GPRA Interview (Intake)	11/7/2013	11/7/2013	Completed	Review

Note the Intake Activity Date.

3. Select **Add New Client Consent Record**.

4. Select the **Disclosed to Agency** and enter the **Purpose for disclosure**. The **Disclosure Selection** will automatically populate once the agency is selected.

5. Enter the **Intake Date as the Earliest date of services to be consented**.

Note: This determines the information that will be consented. If an Intake is selected to be consented, the Disclosed to Agency will not be able to see it if the date entered in this step is later than the date of the Intake. It is important to view the activity list prior to this step to verify the date consented activities were created.

Client Consent List							Add New Client Consent Record
Start Date	Disclosed To	Status	Signed?	Created Date	Revocation Date	Actions	

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Morning, Thursday
Unique Client Number: 21010187389320H
Disclosed From Agency: D Williams Agency

Entities with Disclosure Agreements: All Other Agencies
System Agency: Yes
Disclosed To Agency: RSS Stand Alone
Disclosed To Entity (Non System Agency):
Purpose for disclosure: RSS Services

Earliest date of services to be consented: 11/7/2013
Has the client signed the paper agreement form: No
Date client signed consent:

Client Information Options

Consent Expires Upon

Disclosure Selection

Admission
CAFAS® Assessment
CALOCUS Assessment
Client Eligibility
Court Monitoring Form
Discharge
Discharge/Continuing Care Plannin
Dispensary Order Detail
Drug Test Results
ECourt Admission
ECourt Case Management

☐ Discharge(UD) +Days
☐ Date Signed(DS) +Days
☐ Other Event(OE) Exp
☐ Crim Just Cond (CJC) Exp

Client Information (Profile) (UD, +365)
Consent (UD, +365)
Intake Transaction (UD, +365)

Description

Comments

Other Disclosures

Cancel Save Finish

6. Select **Yes** after the client has signed the Release of Information.

7. The Date client signed consent will default to today's date. Update as necessary.

8. Select **Save**.

NOTE: Select Print General Consent if you want to use the Release of Information generated from WITS.

Client Disclosure Agreement

Note: Consented information may not be redisclosed.

Client Name: Morning, Thursday
Unique Client Number: 21010187389320H
Disclosed From Agency: D Williams Agency

Entities with Disclosure Agreements: All Other Agencies
System Agency: Yes
Disclosed To Agency: RSS Stand Alone
Disclosed To Entity (Non System Agency):
Purpose for disclosure: RSS Services

Earliest date of services to be consented: 11/7/2013
Has the client signed the paper agreement form: Yes
Date client signed consent: 3/13/2014

Client Information Options

- Admission
- CAFAS® Assessment
- CALOCUS Assessment
- Client Eligibility
- Court Monitoring Form
- Discharge
- Discharge/Continuing Care Plannin
- Dispensary Order Detail
- Drug Test Results
- ECourt Admission
- ECourt Case Management

Consent Expires Upon

- ☐ Discharge(UD) +Days
- ☐ Date Signed(DS) +Days
- ☐ Other Event(OE) Exp
- ☐ Crim Just Cond (CJC) Exp

Description:

Disclosure Selection

- Client Information (Profile) (UD, +365)
- Consent (UD, +365)
- Intake Transaction (UD, +365)

Comments:

Other Disclosures:

Buttons: Cancel, Save, Finish

Numbered callouts: 6 points to the 'Has the client signed the paper agreement form' dropdown; 7 points to the 'Date client signed consent' date field; 8 points to the 'Save' button.